

From: Alison Whetston
Sent: Tue 6/2/2009 4:47 PM
To: Lisa Birkman; Mary Clark
Cc: Julie Kiley
Subject: Action Items - May 27th "Community Room Rental Policy update" Meeting

Commissioner Birkman & Mary,

May 27th "Community Room Rental Policy update" Meeting

Action Items

- June 8th Agenda item for Commissioner's Court Update
- High level Project Plan
- IT requirement List (Including CLASS software functionality)

Inky has completed set-up in Class (test/training system) and IT can be ready as soon as required. After talking with Mary today, it is my understanding we may be looking at a different software solution. Do you want to put the IT tasks on hold until we receive final software requirements?

Thanks,
Alison

1. High-level Project Plan, (requires further input)

| Functional Areas | Tasks | Notes | Dates | O |
|--|--|--|----------|----|
| Resource for After Hours Room Monitoring | Determine method for resolving resource for after hours room monitor | Alternatives: - RFP Process - State List or Buy Board - Under 25K annually for commodity code? - Hire part-time <20 week | | P |
| Class Software | Setup and configure test system | * See Class Requirements | Complete | In |
| | Review and sign off Test configuration | | | Al |
| | Set-up Class configuration in Production | | 1-Aug | In |
| Misc. | Confirm personal resources for scheduling and managing meeting rooms | | | M |

| | | | | |
|----------------------------------|---|---|-----------------|----|
| | Assign Main Phone Number | | 1-Aug | Bi |
| | Assign general email | | 1-Aug | Je |
| | Order Class Software | Budget?? | 1-Aug | M |
| | | | | |
| Payments | Define Credit Card Process | Based on process definition there may be more IT set-up required. | | Ju |
| | Define Cash Check Process | | | Ju |
| | Receipt Process | | | Ju |
| | Room Confirmation Process | | | Ju |
| | Define Return Deposit Process | | | Ju |
| | Create a process where at set times refunds are processed and sent to whoever creates checks or refunds CC's etc. | | | Ju |
| Web-Site Requirements | | | | |
| | Images with brief description of Facilitates in .dotnetnuk | | | Da |
| | Calendar | | | Da |
| | Fee Schedule | | | In |
| | PDF -Williamson County Community Room Usage Consent | | | In |
| | PDF - Rules and Regulation | | | In |
| | On-Line Form submission | | | D |
| | Create Artwork and Verbiage for homepage announcements | | | Da |
| SharePoint Calendar Views | Define SharePoint Calendar Process | | Mid Sept. 1hour | In |
| | Set-up user accounts | | | In |
| | | | | |
| Training | Train Room Managers on software and processes | | | In |
| | Go Live | | 1-Oct | Pr |
| | | | | |

2. IT Functional Requirements

| Req # | Requirement Description | Mandatory or Nice To H |
|-------|-------------------------|------------------------|
| 1 | On-line Room Calendar | Mandatory |

| | | |
|---|--|--------------|
| 2 | Provide electronic receipt | Mandatory |
| 3 | Customer notification for deposit return | Mandatory |
| 5 | Work flow notification for room manager | Nice to Have |

3. Class Set-Up

Set up Under System Maintenance:

Users

Terminals

User Groups if necessary

Decide which users can do what in the system and who can process refunds etc.

Set up Under Facility Maintenance:

Booking Tab:

Forms (reminder check boxes)

Functions

Rental Extra Fees (extra personnel after hours)

Facility Tab:

Complexes

Facility Types

Facilities

Facility Fees

Attach each fee to open times they are allowed to be used for each facility

Booking Time Units (if necessary)

Other Tab:

GL Codes: Animal Shelter 01.0545.0000.362200

All Other 01.0100.0000.362200

Rentals Tab:

Change Rental Contracts / Permits to General County Name? or leave as Parks?

Create as needed reminders/ticklers to remind staff to add Security Deposit, extra staff.